

Job Aid: How to Create an RPA Requisition

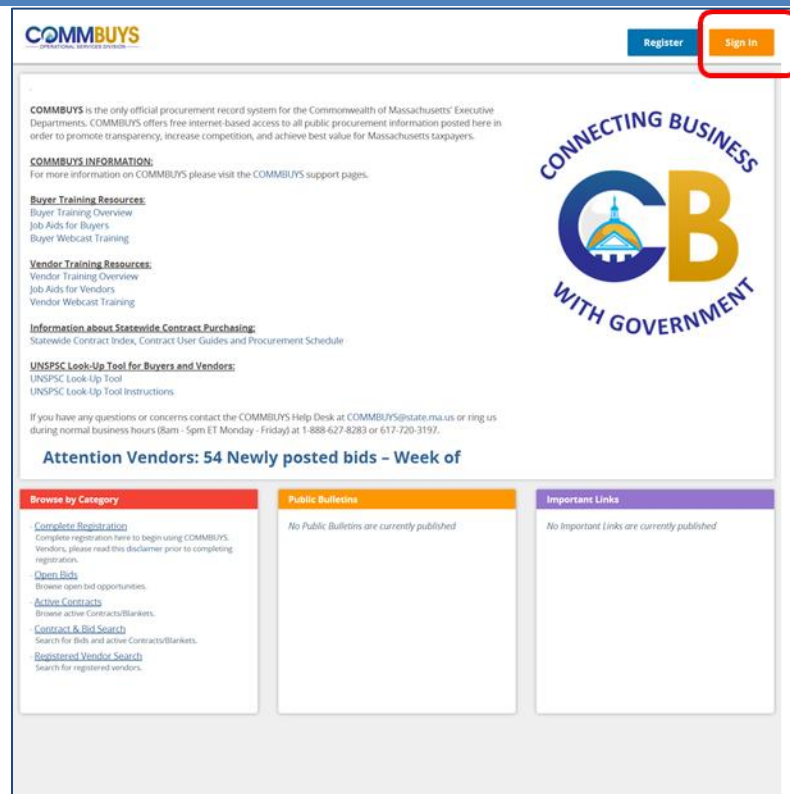
This Job Aid Shows How To:

- Create an RPA Requisition in COMMBUYS

Of Special Note:

An RPA is a Request for Payment Authorization after a purchase has been made for goods or services not on an enabled statewide contract (SWC). These purchases are somewhat rare and must be approved by the appropriate authority at your agency prior to purchase. Purchasing through SWCs or a normal procurement is always the standard approach.

Screenshot



Directions

Step 1: Log-in to COMMBUYS

1. Launch the COMMBUYS website by entering the URL (<https://www.commbuys.com>) in the browser or by clicking on the hyperlink [COMMBUYS](https://www.commbuys.com).
2. Click on the orange **Sign In** button in the upper right hand corner.

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Step 2: Logging In

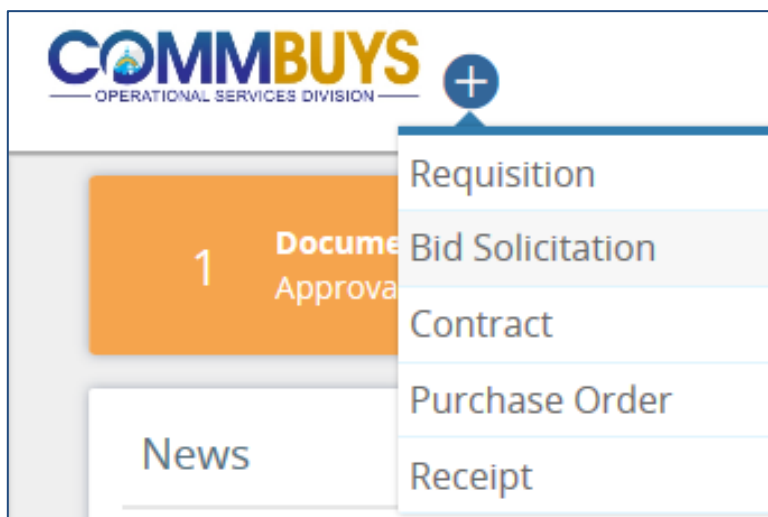
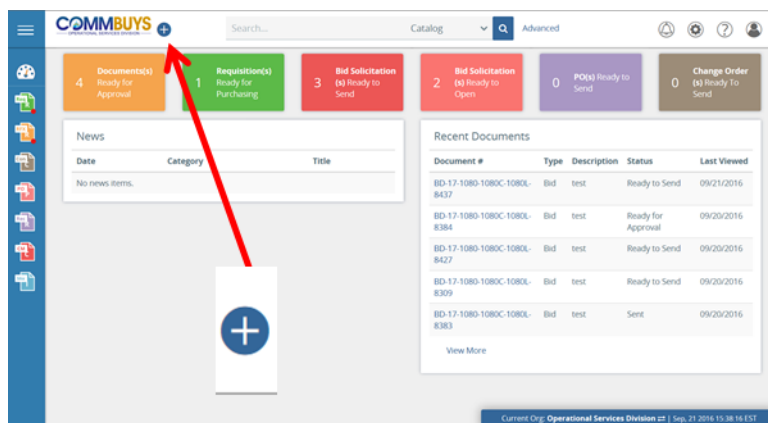
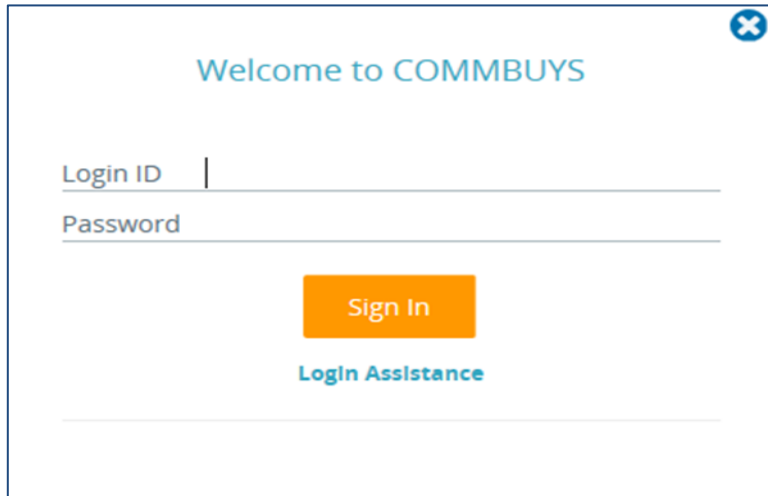
1. Enter your Login ID and Password.
2. Click on the **Sign In** button.

Step 3: Creating a New Document

Click on the **Add Documents** (plus sign) icon.

Step 4: Selecting Requisition

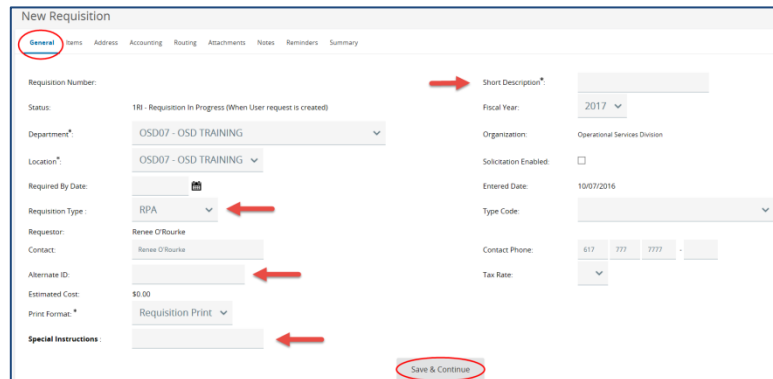
Select **Requisition** from the dropdown menu.



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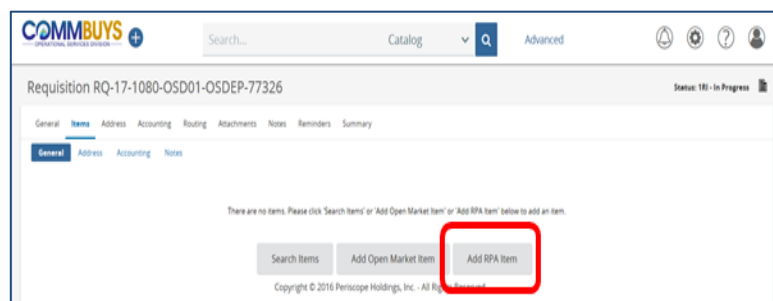
Step 5: Entering Data in the General Tab

The **General** tab page displays. Fields with asterisks are required fields. The required fields for **Department**, **Location**, and **Print Format** default to values that may be changed if needed.

1. In the required **Short Description** field enter a searchable description of the desired goods or services.
2. Click on the dropdown arrow next to the Requisition Type field and select **RPA** (do NOT select RPA Release).
3. **Alternate ID**: Enter information as required. This may include (but not limited to) data such as MMARS encumbrance ID or ERP/Accounting system transaction numbers for non-MMARS users.
4. **Special Instructions**: Enter information as required. This field allows for entry of specific instruction to vendors. If entered on the requisition, the data in this field will copy forward to the PO and also be visible on the print version of the PO. This may include (but not limited to) data such as shipping drop off info, locations, additional contacts, etc.
5. When you are finished, click on the **Save and Continue** button.

Step 6: Searching for Items

1. Click on the **Items** tab.
2. Click on the **Add RPA Item** button.



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Step 7: Completing the Items Tab General Page

1. When the page refreshes, enter:

- Description of your goods or services
- Invoice number based on the information on your vendor invoice (must be unique)
- Today's date for the invoice date
- Payment due date
- Number of items purchased
- Unit cost of your item
- Unit of measure (defaults to EA. for each)
- UNSPSC Segment-Family Code and Class Code (use lookup to match the commodity or service purchased)

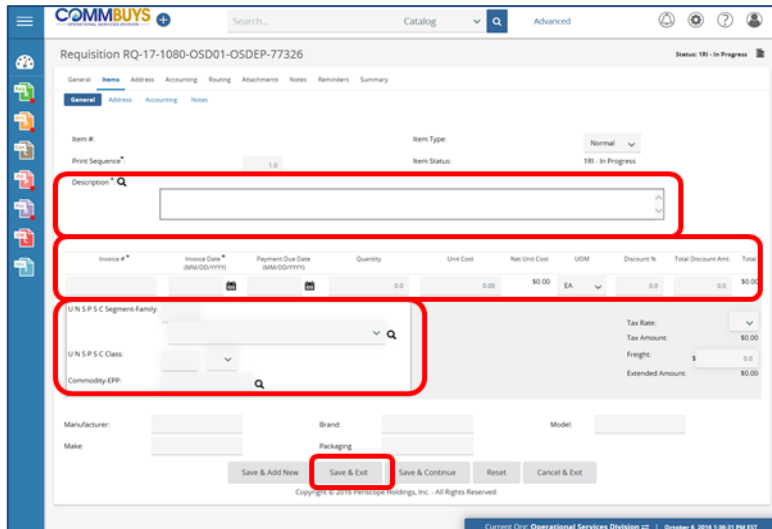
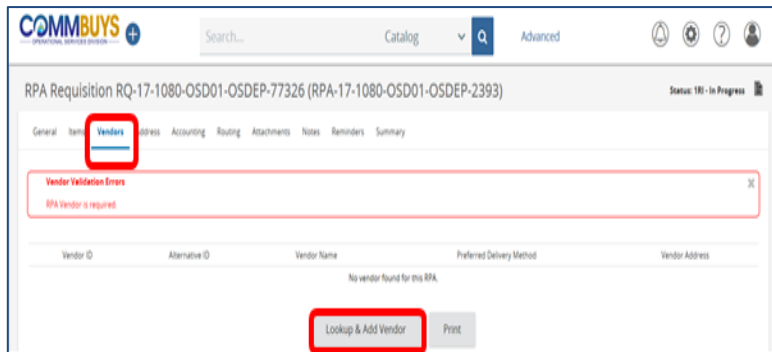
2. Click the **Save & Exit** button.

The screen refreshes to show the item saved successfully. Check all information for accuracy before moving on.

Step 8: Clicking the Vendors Tab

1. Click on the **Vendors** tab.
2. Click on the **Lookup & Add Vendor** button.

NOTE: The vendor must be registered in COMMBUYS. If not, then they should register immediately. If the vendor needs assistance with registration, please refer them to the COMMBUYS helpdesk at 1-888-627-8283 or 617-720-3197.

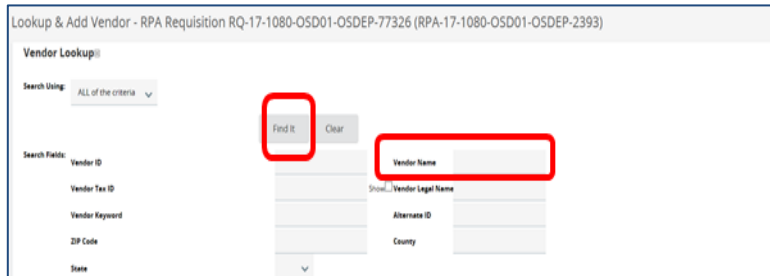
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Step 9: Looking Up a Vendor

1. Enter the name of the vendor in the **Vendor Name** field and click on the **Find It** button.



Lookup & Add Vendor - RPA Requisition RQ-17-1080-OSD01-OSDEP-77326 (RPA-17-1080-OSD01-OSDEP-2393)

Vendor Lookup:

Search Using: ALL of the criteria

Search Fields:

Vendor ID

Vendor Tax ID

Vendor Keyword

ZIP Code

State

Find It

Clear

Vendor Name

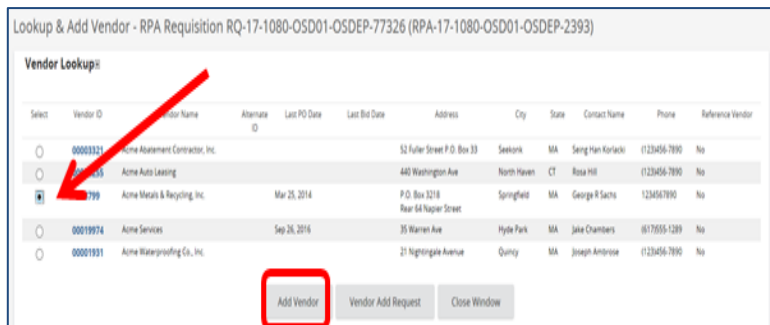
Show Vendor Legal Name

Alternate ID

County

Step 10: Adding the Vendor

1. In the **Select** column, click on the radio button next to the vendor name to select the vendor.
2. Scroll to the bottom of the page and click on the **Add Vendor** button.



Lookup & Add Vendor - RPA Requisition RQ-17-1080-OSD01-OSDEP-77326 (RPA-17-1080-OSD01-OSDEP-2393)

Vendor Lookup:

Select	Vendor ID	Vendor Name	Alternate ID	Last PO Date	Last Bid Date	Address	City	State	Contact Name	Phone	Reference Vendor
<input type="radio"/>	0000324	Acme Abatement Contractor, Inc.				52 Fuller Street P.O. Box 33	Seekonk	MA	Seng-Han Kiriacki	(123456-7890)	No
<input type="radio"/>	0000355	Acme Auto Leasing				440 Washington Ave	North Haven	CT	Rosa Hill	(123456-7890)	No
<input checked="" type="radio"/>	0000799	Acme Metals & Recycling, Inc.		Mar 25, 2014		P.O. Box 3218 Rear 64 Napier Street	Springfield	MA	George R Sachs	1234567890	No
<input type="radio"/>	0001974	Acme Services		Sep 26, 2016		35 Warren Ave	Hyde Park	MA	Jake Chambers	(617)855-1289	No
<input type="radio"/>	00001931	Acme Waterproofing Co., Inc.				21 Nightingale Avenue	Quincy	MA	Joseph Amoroso	(123456-7890)	No

Add Vendor

Vendor Add Request

Close Window

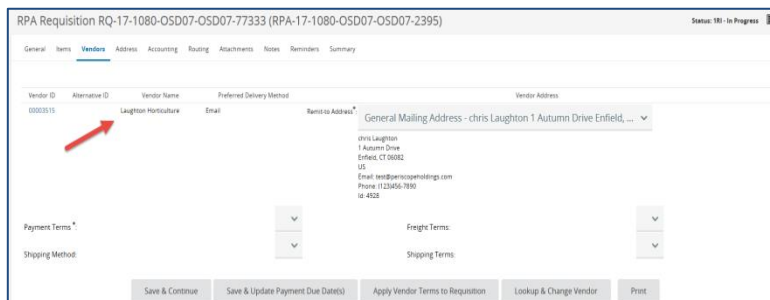
Step 11: Verify Vendor

Ensure the vendor is correct.

Go to the Summary tab to complete your requisition.

Do Not click on Save & Continue button.

Do Not choose Payment Terms.



RPA Requisition RQ-17-1080-OSD07-OSD07-77333 (RPA-17-1080-OSD07-OSD07-2395)

General Mailing Address - chris Laughton 1 Autumn Drive Enfield, ...

Vendor ID: 0000355

Vendor Name: Laughton Horticulture

Preferred Delivery Method

Vendor Address

General Mailing Address - chris Laughton 1 Autumn Drive Enfield, CT 06082 US Email: sendpersonnel@lhtg.com Phone: (123456-7890) 10 4523

Payment Terms *

Shipping Method

Freight Terms

Shipping Terms

Save & Continue

Save & Update Payment Due Date(s)

Apply Vendor Terms to Requisition

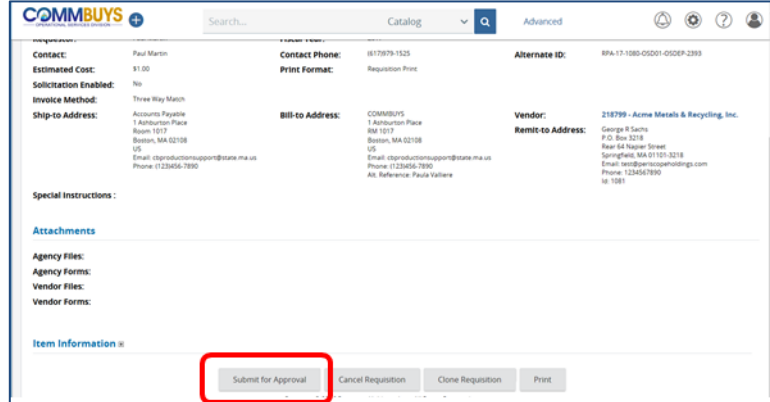
Lookup & Change Vendor

Print

Job Aid: How to Create an RPA Requisition

Screenshot

Directions



The screenshot shows the COMMBUYS interface for creating an RPA Requisition. The form includes fields for Contact, Estimated Cost, Solicitation Enabled, Invoice Method, Ship-to Address, Bill-to Address, Vendor, and Remit-to Address. At the bottom, there are buttons for 'Submit for Approval', 'Cancel Requisition', 'Clone Requisition', and 'Print'. The 'Submit for Approval' button is highlighted with a red box.

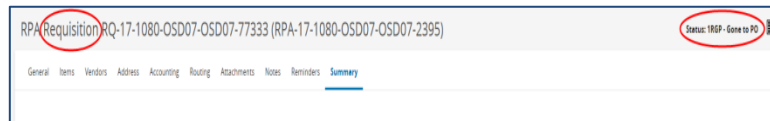
Step 12: Submitting for Approval

1. Click on the **Summary** tab.
2. Check all the information for accuracy and make corrections if necessary by returning to the appropriate tab to make and save any needed changes. Then return to the **Summary Tab**
3. Scroll to the bottom of the page and click the **Submit For Approval** button.

Step 13: Saving the Approval

The approval path is shown or you're given the option to select the appropriate one. Click the **Save & Continue** button to complete.

NOTE: The RPA Requisition will now proceed through your department's approval path (**no image is provided here as your approval path will vary**). You will be informed by COMMBUYS email when the approval is complete.



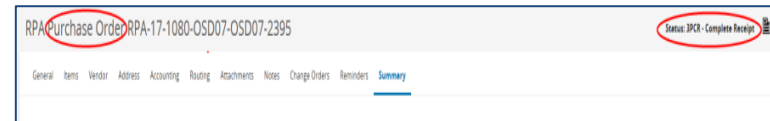
The screenshot shows the RPA Requisition Summary tab. The title bar indicates the requisition number: RPA-17-1080-OSD07-77333 (RPA-17-1080-OSD07-2395). The status is '196P - Gone to PO'.

Step 14: Requisition has Gone to PO

After approval, the Summary tab of the RPA Requisition will have the status of **Gone to PO**.

The Summary tab of the RPA Purchase Order will have the status of **Complete Receipt**.

NOTE: The vendor will not see this PO.



The screenshot shows the RPA Purchase Order Summary tab. The title bar indicates the purchase order number: RPA-17-1080-OSD07-OSD07-2395. The status is '3PCR - Complete Receipt'.